

This form will enable you to designate a beneficiary or beneficiaries for any death benefits payable by the Employees' Retirement System (ERS) on your behalf.

## DESIGNATION INSTRUCTIONS

### Primary Beneficiary:

Designate **one** beneficiary to receive an Ordinary Death Benefit (single payment) OR a lifetime pension if retirement eligibility requirements are met. *A trust, estate, and multiple primary beneficiaries are not eligible to receive a lifetime pension. Health coverage may also be affected. Contact Employer-Union Health Benefits Trust Fund (EUTF) for more information.*

If more than one primary beneficiary is desired, list each Primary Beneficiary and specify what percent of 100% each will receive. **Any benefit shall be shared equally amongst the primary beneficiaries unless the amount specified in the Percentage block indicates otherwise.**

### Contingent Beneficiary:

Contingent beneficiary(ies) only receive benefits if the primary beneficiary(ies) predecease them. List your contingent beneficiary(ies) in the Contingent Beneficiary block specifying what percent of 100% each contingent beneficiary will receive. **Any benefit shall be shared equally amongst the contingent beneficiaries unless the amount specified in the Percentage block indicates otherwise.** If successive contingent beneficiary(ies) are to receive 100% in the event the primary contingent beneficiary(ies) dies, indicate the order of preference next to their names – 1<sup>st</sup> contingent, 2<sup>nd</sup> contingent, etc.

### Trust:

Indicate the exact name and date of the trust.

## EFFECT OF MARRIAGE, DIVORCE OR DEATH OF BENEFICIARIES

*Designations must be updated whenever there is a change in marital status or a beneficiary dies.*

Section 88-93 of the Hawaii Revised Statutes specifies that all beneficiary designations become null and void when:

- 1) the beneficiary predeceases the member;
- 2) the member is divorced from the beneficiary;
- 3) the member is unmarried and subsequently marries; or
- 4) the member enters into or terminates a reciprocal beneficiary relationship.

If any of the above occurs and a new designation is not filed with the ERS, benefits will be paid to your surviving spouse or reciprocal beneficiary. If there is no surviving spouse or reciprocal beneficiary, benefits will be paid to any dependent children under age 18 otherwise, your estate will receive the benefits.

## QUESTIONS?

Oahu 586-1735	From the neighbor islands <i>toll free to Oahu:</i>
	Hawaii 974-4000 ext. 61735
	Maui 984-2400 ext. 61735
	Kauai 274-3010 ext. 61735
	Molokai/Lanai 1-800-468-4644 ext. 61735

On the neighbor islands:

Hawaii	974-4077
Maui	984-8181
Kauai	274-3010